Task List

The eWiSACWIS Task List can be used by workers to track current, upcoming, and overdue tasks, including both system generated (ticklers) and worker entered (manual) tasks. For supervisors the Task List can also be used to manage their workers workload.

eWiSACWIS generated "Ticklers" display on the Task List as system generated tasks. For a full list of ticklers please see the User Guide titled "Tickler Creation and Removal Information"

Note: Currently Licensing Private Provider ticklers and the 90-Day Summary Report for Serious Incident tickler do not show on the Task List as tasks.

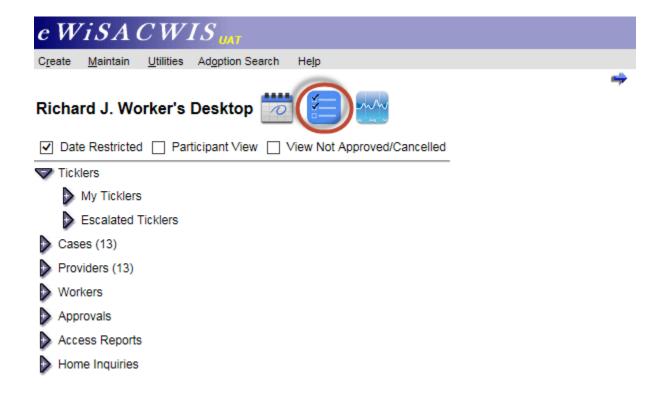
System Created Tasks

The following tasks show on the calendar and task list exclusively, they are not ticklers.

- Initial Face-to-Face This task is created when a CPS Report is screened and shows as due
 based on the response time on the access report. This task is informational only and does not
 get marked as completed and does not show as overdue. This task is created for the primary
 worker and automatically shared with any workers with an assignment of CPS Initial
 Assessment Secondary.
- Permanency Roundtable (PRT) Action Step This task is created when a worker is assigned an action step on the permanency consultation page. The task is marked as complete when the action step has been marked as complete on the permanency consultation page.
- Reassign work: (Workers Name) This task is created and assigned to a supervisor when one of their workers access is removed.
- Security Audit Due and Security Verification Due These tasks are created every March and October for county security delegates.

Viewing the Task List

To access the Task List, click the Icon next to the worker name on the desktop. If a worker has overdue tasks, the Task List will display immediately upon logging into eWiSACWIS.



When opened the Task List displays tasks due in the next 10 days with overdue tasks listed on top.



Use the Due dropdown to see tasks due in the next 10 days, next 6 months, next 12 months or only overdue tasks.

Use the Case dropdown to filter and only show tasks for a particular case.



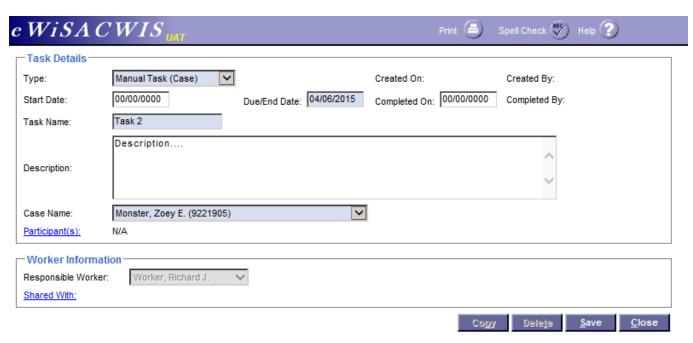
Creating a Task

The Create Task link can be used to create a Manual Task. Once saved, these tasks also display on the calendar.



On the Task page, select the type of Manual Task; Case, Provider or Other. Next, enter the Due/End Date, task name, and description.

For Manual Task (Case) or Manual Task (Provider) a dropdown menu of the worker's assigned cases or providers is available to select from. Click the Participant(s) link to select specific participants.



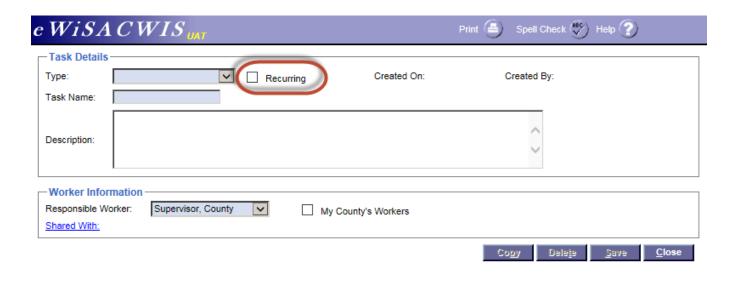
Note: The Start Date field is optional and can be used if a task or event stretches over multiple days.

The Completed On field is used to indicate when a particular task has been completed. Once a date is entered and page saved, the task no longer displays on the Task List, and displays as completed on the calendar.

Creating Recurring Tasks

Recurring tasks are tasks that can be set up to recur at regular intervals. They can be created to recur on daily, weekly, monthly or yearly basis. Workers can create recurring tasks by clicking on the recurring checkbox.

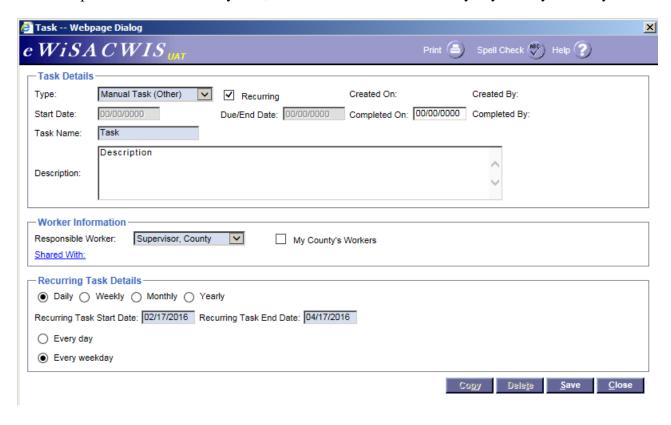
Note: The Type and Task Name inside the Task Details group box and the responsible worker dropdown in Worker Information group box are still required.



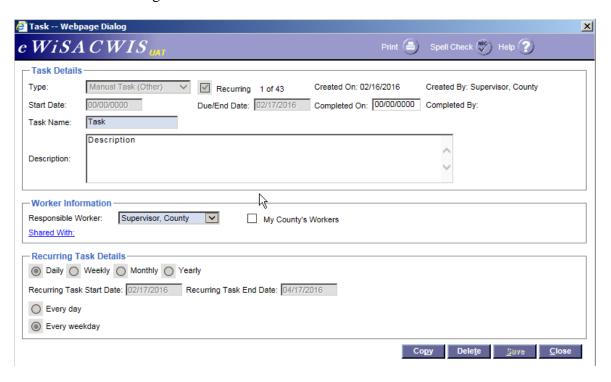
After a task has been set as Recurring the worker can pick Daily, Weekly, Monthly or Yearly. The Recurring Task Start Date and Recurring Task End Date control the date range that the recurring task will be created over. Daily, Weekly and Monthly tasks can be entered for a year into the future; yearly tasks can be entered for up to five years in the future.

For example, if a task is set to recur every weekday it will be created on each weekday that falls between the dates entered.

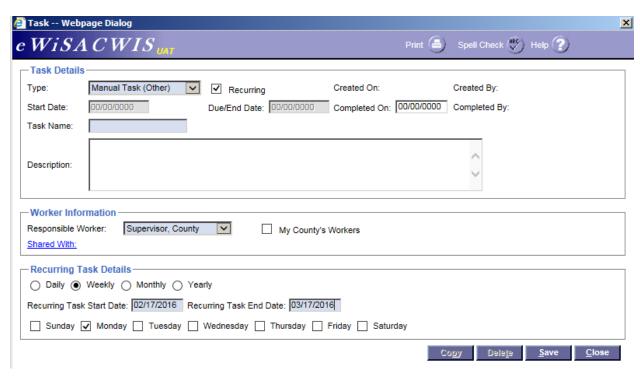
The example below shows a daily task, which can be set to show every day or only weekdays.



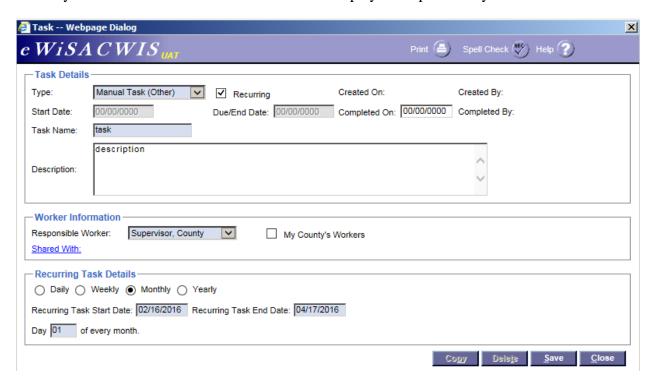
After the page has been saved the Task Details and Worker Information can still be updated however the Recurring Task Details cannot.



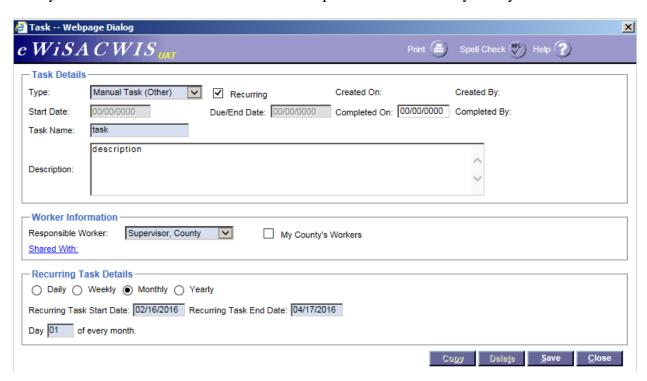
Weekly tasks allow the worker to set the task to display on a specific day of the week.



Monthly tasks allow the worker to set the task to display on a specific day of the month:



Yearly tasks allow for a task to be created on a specific Month and Day each year.

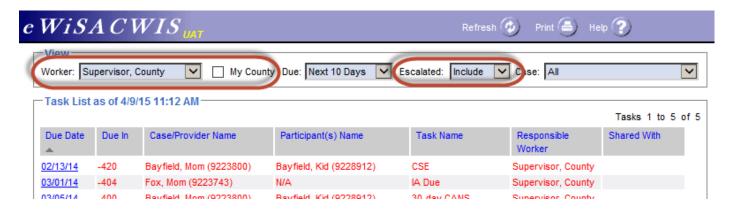


For Supervisors:

Supervisors have additional options on the Task List to help with managing their workers workloads.

For the View, supervisors see the following options:

- Escalated: This option allows supervisors to choose whether or not ticklers escalated to them by workers display.
- Worker: This drop down allows a supervisor to view tasks for a particular worker.
 - Selecting the value "All My Workers" will display all of the tasks for all workers that the supervisor is listed as supervisor for.
 - O Selecting the value "Multi-Select Workers will pop up a page (see below) that allows the supervisor to select multi of their workers and/or any workers in the county to view tasks simultaneously.
- My County Checking this box allows supervisors to see not only their own workers, but all workers for their county in the Worker dropdown.



Supervisors also have the ability to create Manual Tasks for their workers. When a supervisor is viewing a workers task list clicking the Create Task link will create a task for that worker. Additionally, supervisors have the ability to change the responsible worker in the dropdown and share the task with multiple workers by clicking the Shared With link.

Note: For Ticklers the responsible worker cannot be changed, the tickler would have to be reassigned; however the Shared With link can be sued to share the task with multiple workers.

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Task Details			
Туре:	Manual Task (Other)	Created On: 04/06/2015	Created By: Supervisor, County
Start Date:	00/00/0000 Due/End Date: 04	1/06/2015 Completed On: 00/00/0000	Completed By:
Task Name:	Task 3		
Description:			^
			~
	'		
Worker Information			
Responsible Worker: Supervisor, County My County's Workers			
Shared With: DefaultWorker, Green; Worker - Green, County			
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The worker selection pop up page is used both for selecting workers whose calendar the supervisor would like to view and for selecting workers to share a task with.

